



SANDATA ELECTRONIC VISIT VERIFICATION (EVV): VISIT MAINTENANCE

OBJECTIVES



After completing this lesson, you will be able to:

- ◆ Use the Sandata EVV Dashboard to monitor current day visit exceptions
- ◆ Search and review visit exceptions
- ◆ Resolve visit exceptions

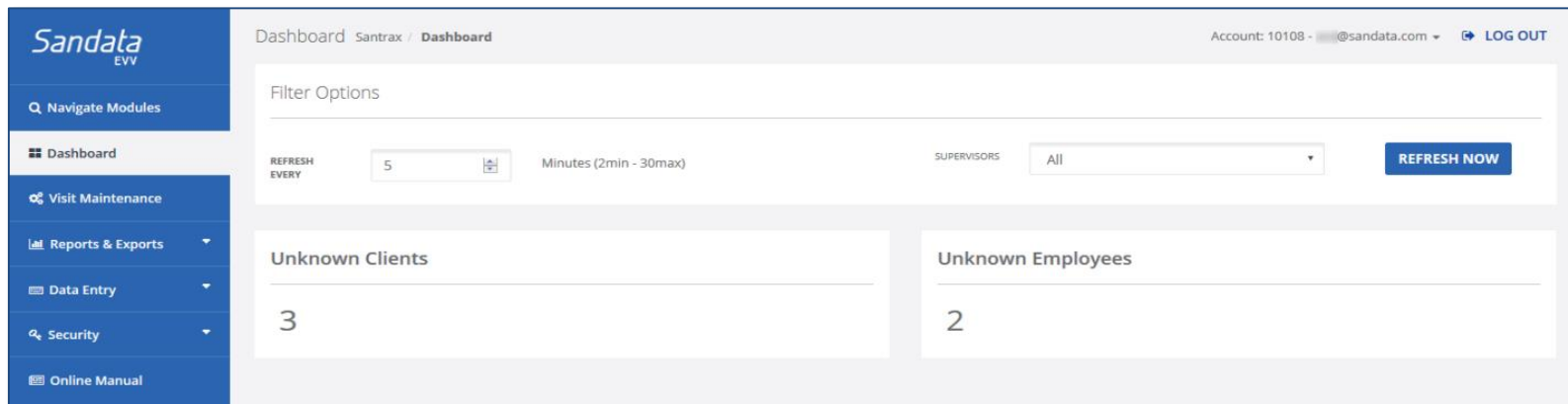
KEY TERMINOLOGY

Term/Acronym	Definition
Client	A person who receives services through the Medicaid program.
Dashboard	Real-time status of the current day's visit exceptions.
Employee	A person who is employed by an agency provider to provide care to one or more clients
Manual Call	Corrective action for the visit exception Visit Without In-Call/Visit Without Out-Call.
Reason Code	A pre-defined list of reasons/explanations for the various correction scenarios. A reason code must be selected when making a change to data in Visit Maintenance.
Visit	A "visit" is the electronic service provided during an in-person encounter to a client in a home and community based setting.
Visit Maintenance	The module within Sandata EVV where visits can be corrected and/or acknowledged.

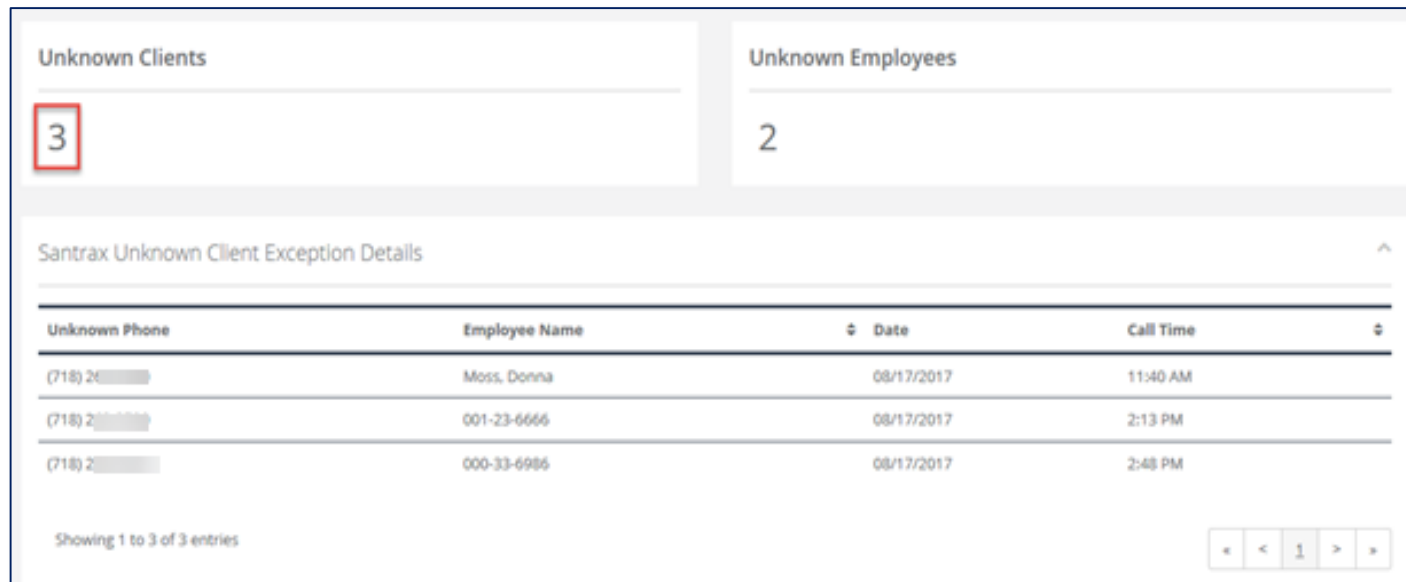


SANDATA EVV DASHBOARD

- ◆ The Sandata EVV Dashboard monitors current day's visits to identify two specific exceptions. These exceptions fall into two categories – **Unknown Clients** and **Unknown Employees**.
- ◆ The data defaults to refresh every five minutes but can be changed to refresh between 2 – 30 minutes. All exception types can be view in Visit Maintenance.

A screenshot of the Sandata EVV Dashboard interface. The left sidebar is blue with the 'Sandata EVV' logo at the top, followed by a search bar and a list of modules: Dashboard, Visit Maintenance, Reports & Exports, Data Entry, Security, and Online Manual. The main content area has a light gray header with 'Dashboard Santrax / Dashboard' and 'Account: 10108 - @sandata.com LOG OUT'. Below the header is a 'Filter Options' section with a 'REFRESH EVERY' dropdown set to '5' (with a note 'Minutes (2min - 30max)'), a 'SUPERVISORS' dropdown set to 'All', and a 'REFRESH NOW' button. The dashboard displays two cards: 'Unknown Clients' with the number '3' and 'Unknown Employees' with the number '2'.

- ◆ Click the Exception category total to display a listing of the visit exception details for that specific exception.

The screenshot shows the Sandata EVV Dashboard. At the top, there are two summary boxes: 'Unknown Clients' with the number '3' (highlighted by a red box) and 'Unknown Employees' with the number '2'. Below these is a section titled 'Santrax Unknown Client Exception Details' which contains a table of exception records. The table has four columns: 'Unknown Phone', 'Employee Name', 'Date', and 'Call Time'. There are three rows of data. At the bottom of the table, it says 'Showing 1 to 3 of 3 entries' and there are navigation buttons for previous, next, and page 1.

- ◆ Click the exception category name to link to the Visit Maintenance module to view and edit the visits for that exception.

Dashboard Santrax / **Dashboard**

Filter Options

REFRESH EVERY Minutes (2min - 30max)

Unknown Clients

3

Visit Maintenance Visit Maintenance / Manage Visits Account: 10060 @sandata.com LOG OUT

Select a Visit CREATE CALL

DATE SELECT MM/DD/YYYY

to

CLIENT

EMPLOYEE

CATEGORY

PAYER

VISIT STATUS

FILTER VISITS BY

EXCEPTION TYPES

Show advanced filter options ▾

Show: per page Show Display Options ▾

Showing 1 to 3 of 3 entries

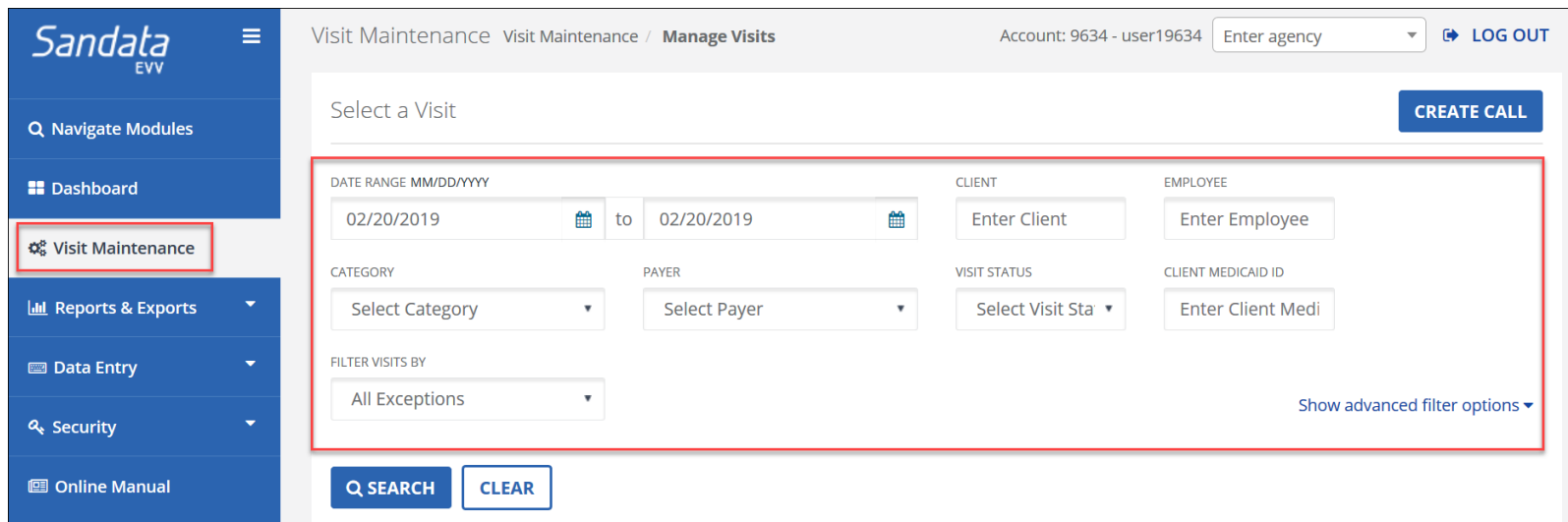
Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Actions
(718) [redacted]	Moss, Donna	[redacted]	08/17/2017	●	11:40 AM					[—]	Incomplete	<input type="checkbox"/>	✎
(718)2 [redacted]	000-33-6986	●	08/17/2017	●	2:48 PM					[—]	Incomplete	<input type="checkbox"/>	✎
(718) [redacted]	001-23-6666	●	08/17/2017		2:13 PM					[—]	In Process	<input type="checkbox"/>	✎



VISIT MAINTENANCE

VISIT MAINTENANCE: SEARCH FILTERS

- ◆ In *Visit Maintenance*, search filters are used to set up parameters to find visits to review and are located on the top half of the *Visit Maintenance* screen. The search results include all data that falls within the specified parameters.



The screenshot displays the Sandata EVV Visit Maintenance interface. On the left is a blue sidebar with navigation links: 'Navigate Modules', 'Dashboard', 'Visit Maintenance' (highlighted with a red box), 'Reports & Exports', 'Data Entry', 'Security', and 'Online Manual'. The main content area is titled 'Visit Maintenance / Manage Visits' and includes an account identifier 'Account: 9634 - user19634' and a 'LOG OUT' link. Below the title is a 'Select a Visit' input field and a 'CREATE CALL' button. A red rectangular box highlights the search filter section, which contains the following elements:

- DATE RANGE MM/DD/YYYY:** Two date pickers set to '02/20/2019' with a 'to' separator.
- CLIENT:** An input field labeled 'Enter Client'.
- EMPLOYEE:** An input field labeled 'Enter Employee'.
- CATEGORY:** A dropdown menu labeled 'Select Category'.
- PAYER:** A dropdown menu labeled 'Select Payer'.
- VISIT STATUS:** A dropdown menu labeled 'Select Visit Sta'.
- CLIENT MEDICAID ID:** An input field labeled 'Enter Client Medi'.
- FILTER VISITS BY:** A dropdown menu labeled 'All Exceptions'.
- Show advanced filter options** (with a dropdown arrow).

At the bottom of the filter section are two buttons: 'SEARCH' and 'CLEAR'.

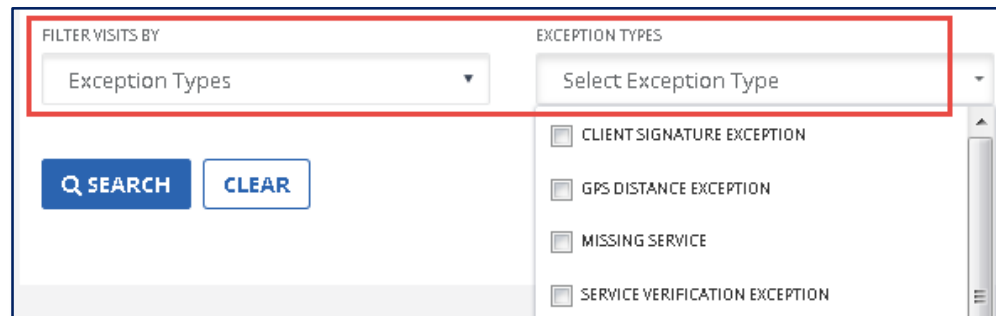
VISIT MAINTENANCE: SEARCH FILTERS

- ◆ Visit status allows a user to filter the visits by their status.

Status	Description
In Process	A visit has started and not yet completed
Incomplete	A visit has exceeded a 24-hr. period and is still missing a call-in/call-out
Verified	A visit that does not contain any exceptions
Processed	A visit that does not contain any exceptions and has been returned to the claims validation engine at least once
Omit	A visit that is marked 'Do Not Bill'

VISIT MAINTENANCE: SEARCH FILTERS

- ◆ You can filter visits by all Exceptions or Exception Types
 - **All Exceptions:** This default setting displays all visits containing one or more exceptions within a specified time period.
 - **Exception Types:** This option selects visits based on the exceptions which apply to the visit. When selected, an additional field appears prompting the user to choose the specific exception type(s) from the additional drop-down field.

A screenshot of a web application interface for filtering visits. It features two main sections: 'FILTER VISITS BY' and 'EXCEPTION TYPES'. The 'FILTER VISITS BY' section has a dropdown menu currently set to 'Exception Types'. Below this are two buttons: 'SEARCH' (with a magnifying glass icon) and 'CLEAR'. The 'EXCEPTION TYPES' section has a dropdown menu labeled 'Select Exception Type' which is open, showing a list of exception types with checkboxes: 'CLIENT SIGNATURE EXCEPTION', 'GPS DISTANCE EXCEPTION', 'MISSING SERVICE', and 'SERVICE VERIFICATION EXCEPTION'. A red rectangular box highlights the 'Exception Types' dropdown and the 'EXCEPTION TYPES' section.

VISIT MAINTENANCE: EXCEPTIONS

Exception	Description
CLIENT SIGNATURE EXCEPTION	Client's digital signature or voice recording is missing.
GPS DISTANCE EXCEPTION	Identifies when a call-in/call-out time exceeds the allowable distance tolerance of 1000 feet from the client's home or another address associated with the client in Sandata EVV (e.g., school or work).
MISSING SERVICE	Identifies when the service provided for the visit is not specified during the MVV call-in or Telephony call-out.
SERVICE VERIFICATION EXCEPTION	Client did not confirm the selected service.
UNAUTHORIZED SERVICE	This exception occurs when an employee selects a service for a visit that does not match to the service the client receives. The exception must be fixed in the Visit Details screen.

VISIT MAINTENANCE: EXCEPTIONS

Exception	Description
UNKNOWN CLIENTS	Identifies when a visit occurs where the client is not known. This can occur when the Medicaid ID entered does not match to an existing client or the phone number entered does not match to a known client.
UNKNOWN EMPLOYEES	Identifies when the Santrax ID entered during a Telephony call does not match to any known employee.
UNMATCHED CLIENT PHONE/ID	Identifies when a client ID is entered during a Telephony call, but the phone number the call was made from is not a number listed for the client.
VISIT VERIFICATION EXCEPTION	Identifies when the start and/or end time have not been verified by the client at the end of the visit, either by confirming during the MVV call-out or verifying the times during the Telephony call-out.
VISIT WITHOUT IN-CALLS	Identifies a visit which does not have a call-in.
VISIT WITHOUT OUT-CALLS	Identifies a visit which does not have a call-out.

VISIT MAINTENANCE: IDENTIFYING EXCEPTIONS

- ◆ Visit Exceptions are indicated by a colored circle under one or more columns where the exception exists. The columns are: **Client Name**, **Employee Name**, **Service**, **Call In** or **Call Out**.
 - An exception indicates the visit is missing information or the information captured does not meet program requirements.
 - A visit may have one or more exception(s).
 - Hovering over an indicator displays a pop-up showing the description of the exception(s).

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours
Carter, John	Young, Charles		08/14/2017		2:47 PM				
Carter, John	Young, Charles		08/14/2017		2:46 PM				
Carter, John	000-44-6258		08/14/2017						

Exceptions:
Visits
without in-
calls

CORRECTING EXCEPTIONS

CORRECTING EXCEPTIONS: GPS DISTANCE EXCEPTION

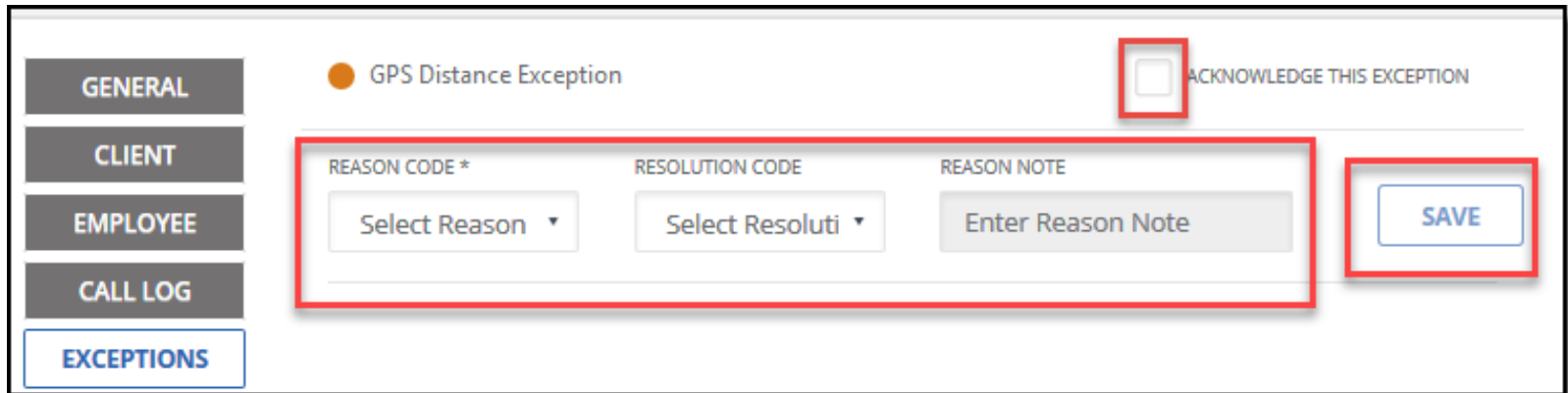
- ◆ This exception identifies when a call-in/call-out GPS location exceeds the allowable distance tolerance feet from the client's home or any other address associated with the client. This exception can be identified by the indicator under the call-in and/or call-out time.
- ◆ This exception must be acknowledged for the visit to be in a verified state and eligible to be matched to a submitted claim.

1. Click the exception indicator under the **Call-In or Call-Out** Column.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out
Greene, Mark	Young, Charles		08/14/2017	10:09 AM	10:18 AM	00:09		

CORRECTING EXCEPTIONS: GPS DISTANCE EXCEPTION


2. Check the **ACKNOWLEDGE THIS EXCEPTION** checkbox on the GPS Distance Exception line.
3. Select a **REASON CODE** from the list that best explains the exception.
4. Select a **RESOLUTION CODE** from the list.
5. Click **SAVE**.

A screenshot of the Sandata EVV software interface. On the left is a vertical sidebar with buttons for 'GENERAL', 'CLIENT', 'EMPLOYEE', 'CALL LOG', and 'EXCEPTIONS' (which is highlighted with a blue border). The main area shows a 'GPS Distance Exception' entry with an orange dot icon. To the right of the entry is a checkbox labeled 'ACKNOWLEDGE THIS EXCEPTION', which is highlighted with a red box. Below this, there is a red-bordered box containing three fields: 'REASON CODE *' with a dropdown menu showing 'Select Reason', 'RESOLUTION CODE' with a dropdown menu showing 'Select Resoluti', and 'REASON NOTE' with a text input field showing 'Enter Reason Note'. To the right of this red box is a 'SAVE' button, also highlighted with a red box.

CORRECTING EXCEPTIONS: MISSING SERVICE EXCEPTION

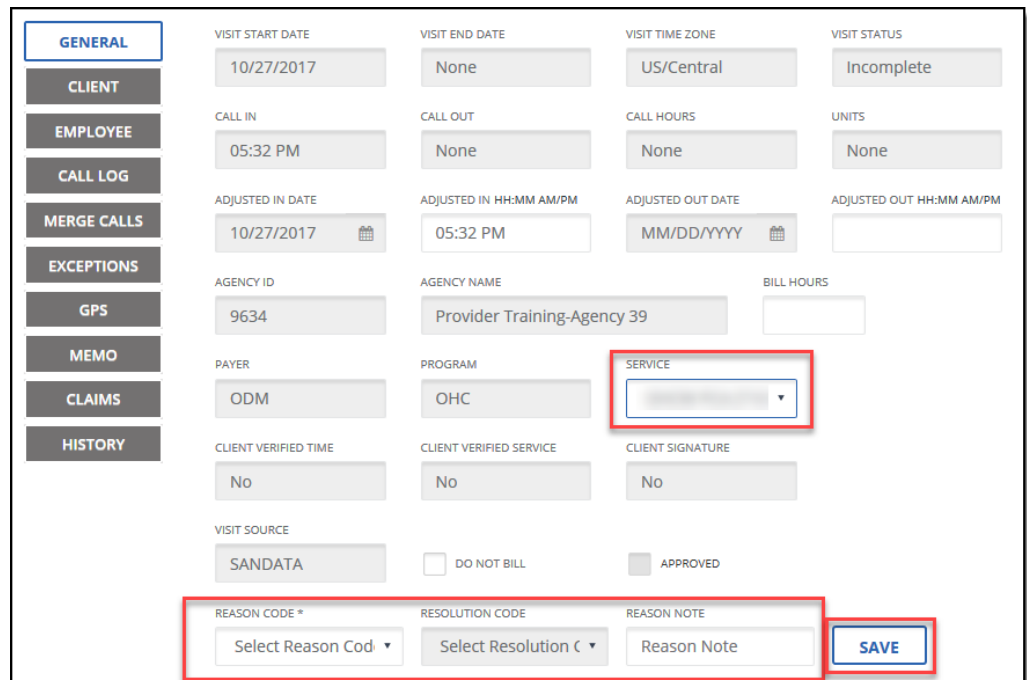
- ◆ This exception identifies when the service provided for the visits is not specified during the SMC call-in or Telephony call-out process.
- ◆ This type of exception must be fixed for the visit to be in a verified state and eligible to be matched to a submitted claim.

1. Click the exception indicator under the **Service** column.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out
Carter, John	Young, Charles		08/14/2017		2:47 PM			

CORRECTING EXCEPTIONS: MISSING SERVICE EXCEPTION

2. Select the correct service from the SERVICE field drop-down list.
3. Select a **REASON CODE** that best explains why the service was not selected at the time of visit.
4. Select a **RESOLUTION CODE** from the list.
5. Click **SAVE**.






GENERAL	VISIT START DATE 10/27/2017	VISIT END DATE None	VISIT TIME ZONE US/Central	VISIT STATUS Incomplete
CLIENT	CALL IN 05:32 PM	CALL OUT None	CALL HOURS None	UNITS None
EMPLOYEE	ADJUSTED IN DATE 10/27/2017	ADJUSTED IN HH-MM AM/PM 05:32 PM	ADJUSTED OUT DATE MM/DD/YYYY	ADJUSTED OUT HH-MM AM/PM
CALL LOG	AGENCY ID 9634	AGENCY NAME Provider Training-Agency 39	BILL HOURS	
MERGE CALLS	PAYER ODM	PROGRAM OHC	SERVICE [Red Box]	
EXCEPTIONS	CLIENT VERIFIED TIME No	CLIENT VERIFIED SERVICE No	CLIENT SIGNATURE No	
GPS	VISIT SOURCE SANDATA	<input type="checkbox"/> DO NOT BILL	<input type="checkbox"/> APPROVED	
MEMO	REASON CODE * Select Reason Cod			RESOLUTION CODE Select Resolution C
CLAIMS	REASON NOTE Reason Note			SAVE
HISTORY				

CORRECTING EXCEPTIONS: CLIENT SIGNATURE EXCEPTION

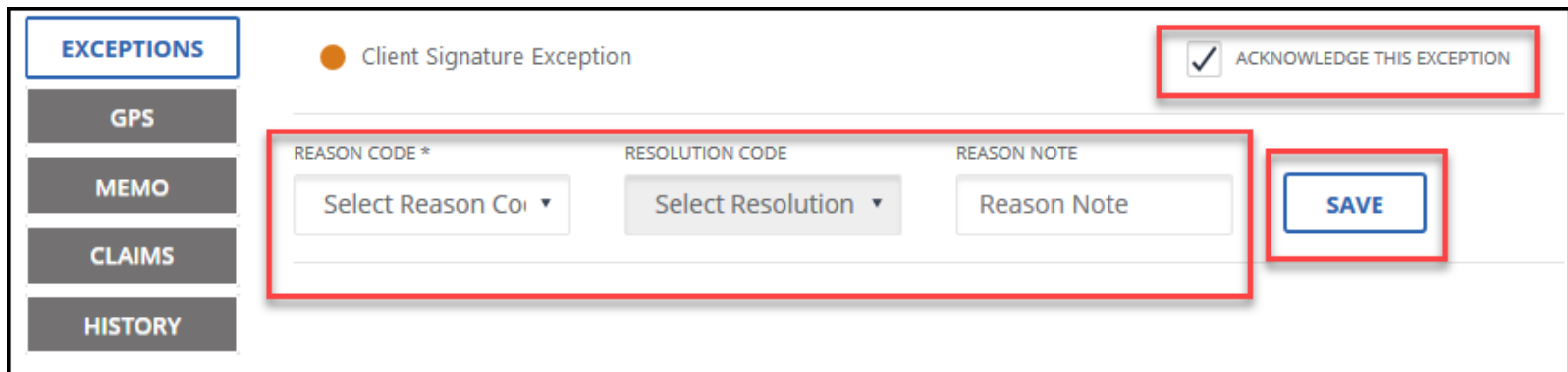
- ◆ This exception identifies when the client signature or voice recording is not captured during the SMC call-out or the client voice recording is not captured during the Telephony call-out.
- ◆ This type of exception must be acknowledged for the visit to be in a verified state and eligible to be matched to a submitted claim.

1. Click the exception indicator under the **Client Name** column.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out
Carter, John 	Young, Charles		08/14/2017		2:47 PM			

CORRECTING EXCEPTIONS: CLIENT SIGNATURE EXCEPTION




2. Check the **ACKNOWLEDGE THIS EXCEPTION** checkbox on the Client Signature Exception line.
3. Select a **REASON CODE** from the list
4. Select a **RESOLUTION CODE** from the list.
5. Click **SAVE**.

A screenshot of the Sandata EVV software interface. On the left is a vertical sidebar with buttons for 'EXCEPTIONS' (highlighted in blue), 'GPS', 'MEMO', 'CLAIMS', and 'HISTORY'. The main area shows a 'Client Signature Exception' entry with an orange dot icon. At the top right of this entry is a checkbox labeled 'ACKNOWLEDGE THIS EXCEPTION' which is checked. Below this, there are three input fields: 'REASON CODE *' with a dropdown menu showing 'Select Reason Coi', 'RESOLUTION CODE' with a dropdown menu showing 'Select Resolution', and 'REASON NOTE' with a text input field labeled 'Reason Note'. To the right of these fields is a blue 'SAVE' button. Red rectangular boxes highlight the 'ACKNOWLEDGE THIS EXCEPTION' checkbox, the three input fields, and the 'SAVE' button.

CORRECTING EXCEPTIONS: UNAUTHORIZED SERVICE EXCEPTION

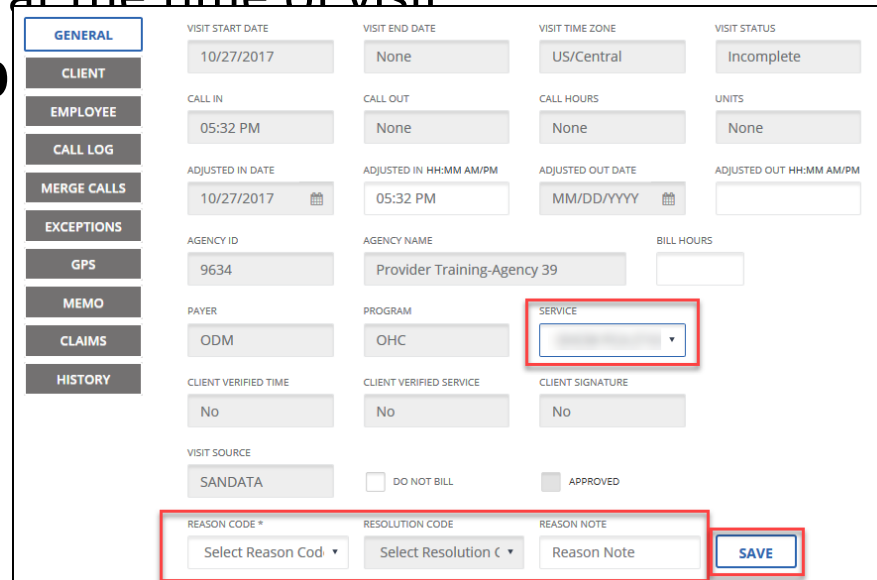
- ◆ This exception identifies when the service selected is not valid for the client. Valid services are based on the client's association to one or more payer and their associated services.

1. Click the exception indicator under the **Service** column.

Client ID	Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours
	Steve, Smith	Jones, Frank		01/09/2019	10:00 AM		
		Jones, Frank		/18/2019	02:01 PM	02:28 PM	00:27

CORRECTING EXCEPTIONS: UNAUTHORIZED SERVICE EXCEPTION

2. Select the appropriate service from the drop-down list. Note that the authorized services for the client must be received in order to fix this exception.
3. Select a **REASON CODE** that best explains why the service was not selected at the time of visit
4. Select a **RESOLUTION CODE**
5. Click **SAVE**.






GENERAL	VISIT START DATE 10/27/2017	VISIT END DATE None	VISIT TIME ZONE US/Central	VISIT STATUS Incomplete
CLIENT	CALL IN 05:32 PM	CALL OUT None	CALL HOURS None	UNITS None
EMPLOYEE	ADJUSTED IN DATE 10/27/2017	ADJUSTED IN HH:MM AM/PM 05:32 PM	ADJUSTED OUT DATE MM/DD/YYYY	ADJUSTED OUT HH:MM AM/PM
CALL LOG	AGENCY ID 9634	AGENCY NAME Provider Training-Agency 39	BILL HOURS	
MERGE CALLS	PAYER ODM	PROGRAM OHC	SERVICE [Dropdown]	
EXCEPTIONS	CLIENT VERIFIED TIME No	CLIENT VERIFIED SERVICE No	CLIENT SIGNATURE No	
GPS	VISIT SOURCE SANDATA	<input type="checkbox"/> DO NOT BILL	<input type="checkbox"/> APPROVED	
MEMO	REASON CODE * Select Reason Cod	RESOLUTION CODE Select Resolution C	REASON NOTE Reason Note	SAVE
CLAIMS				
HISTORY				

CORRECTING EXCEPTIONS: UNKNOWN CLIENT EXCEPTION

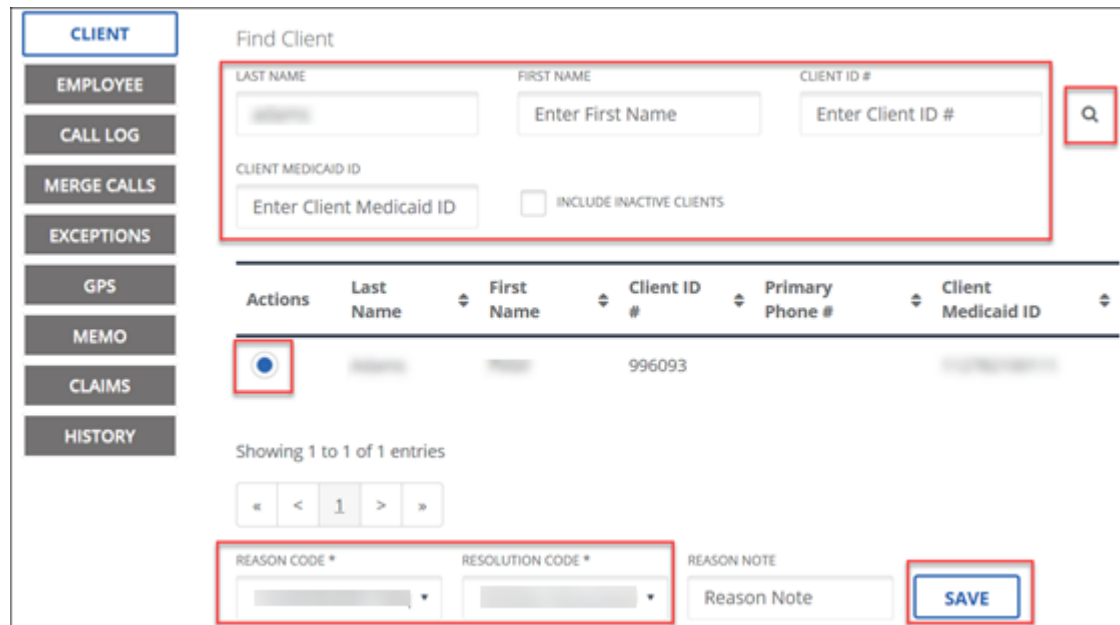
- ◆ This exception identifies when a visit occurs where the client is not known. This can occur when the Medicaid ID entered does not match to an existing client or the phone number entered does not match to a known client.
- ◆ This exception type must be fixed for the visit to be in a verified state and eligible to be matched to a submitted claim.

1. Click the exception indicator under the **Client Name** Column.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out
(555)555-1307 	Munoz, Rebecca		10/27/2017	05:32 PM	

CORRECTING EXCEPTIONS: UNKNOWN CLIENT EXCEPTION

2. Use the search fields to search for the client.
3. Select the client from the search results.
4. Select a **REASON CODE** from the list.
5. Select a **RESOLUTION CODE** from the list.
6. Click **SAVE**.



The screenshot shows the Sandata EVV interface with the 'CLIENT' tab selected. The 'Find Client' section includes search fields for Last Name, First Name, Client ID #, and Client Medicaid ID, along with a search button. Below the search fields is a table with columns: Actions, Last Name, First Name, Client ID #, Primary Phone #, and Client Medicaid ID. A single client entry is shown with a selected radio button in the Actions column. Below the table is a pagination bar showing 'Showing 1 to 1 of 1 entries'. At the bottom, there are dropdown menus for 'REASON CODE *' and 'RESOLUTION CODE *', a text field for 'REASON NOTE', and a 'SAVE' button. Red boxes highlight the search area, the client selection row, and the 'REASON CODE', 'RESOLUTION CODE', and 'SAVE' buttons.

Actions	Last Name	First Name	Client ID #	Primary Phone #	Client Medicaid ID
<input checked="" type="radio"/>			996093		

Showing 1 to 1 of 1 entries

« < 1 > »

REASON CODE * RESOLUTION CODE * REASON NOTE

Reason Note SAVE

CORRECTING EXCEPTIONS: UNKNOWN EMPLOYEE EXCEPTION

- ◆ This exception identifies when the Santrax ID entered during a Telephony call-in/call-out does not match to any known employee. The ID entered is displayed instead of the employee name.
- ◆ This exception type must be fixed for the visit to be in a verified state and eligible to be matched to a submitted claim.

1. Click the exception indicator under the **Employee Name** Column.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In
Carter, John	000-44-6258	●	08/14/2017	3:38 PM	●		



- GENERAL**

No Employee has been associated with this visit.

CLIENT

Find Employee

LAST NAME <input type="text"/>	FIRST NAME <input type="text"/>	EMPLOYEE ID # Employee ID #	DISCIPLINE Select Discipline ▼	<input type="button" value="Q"/>
<input type="checkbox"/> INCLUDE INACTIVE EMPLOYEE				

CALL LOG

MERGE CALLS

EXCEPTIONS

Actions	Last Name	First Name	Employee ID	Santrax ID	Discipline
<input type="radio"/>	[REDACTED]	[REDACTED]		9977261	

Showing 1 to 1 of 1 entries

« < 1 > »

GPS

MEMO

CLAIMS

HISTORY

REASON CODE * <input type="text"/>	RESOLUTION CODE * <input type="text"/>	REASON NOTE Reason Note	<input type="button" value="SAVE"/>
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CORRECTING EXCEPTIONS: UNMATCHED CLIENT PHONE/ID

- ◆ This exception identifies when a client ID is entered during a Telephony call, but the phone number the call was made from is not a number listed for the client.
 - ◆ This exception type must be acknowledged for the visit to be in a verified state and eligible to be matched to a submitted claim.
1. Check the **ACKNOWLEDGE THIS EXCEPTION** checkbox on the Unmatched Client ID/Phone exception line.

 Unmatched Client ID / Phone	<input checked="checked" type="checkbox"/> ACKNOWLEDGE THIS EXCEPTION
---	---



CORRECTING EXCEPTIONS: UNMATCHED CLIENT PHONE/ID EXCEPTION

2. Select a **REASON CODE** from the list.
3. Select a **RESOLUTION CODE** from the list.
4. Click **SAVE**. The Call Log screen shows the originating phone number for the call.

REASON CODE *	RESOLUTION CODE	REASON NOTE	
Select Reason ▼	Select Resoluti ▼	Enter Reason Note	SAVE

GENERAL	CALL IN			CLIENT ID# 0059647013
CLIENT	CALL DATE	CALL TIME	CALL TYPE	SERVICE
EMPLOYEE	08/16/2017	6:48 AM	EVV (telephony)	N/A
CALL LOG	USER	ORIGINATING PHONE #	CALL SOURCE	
	000106825	(718) [REDACTED]	SANDATA	

CORRECTING EXCEPTIONS: VISIT VERIFICATION EXCEPTION

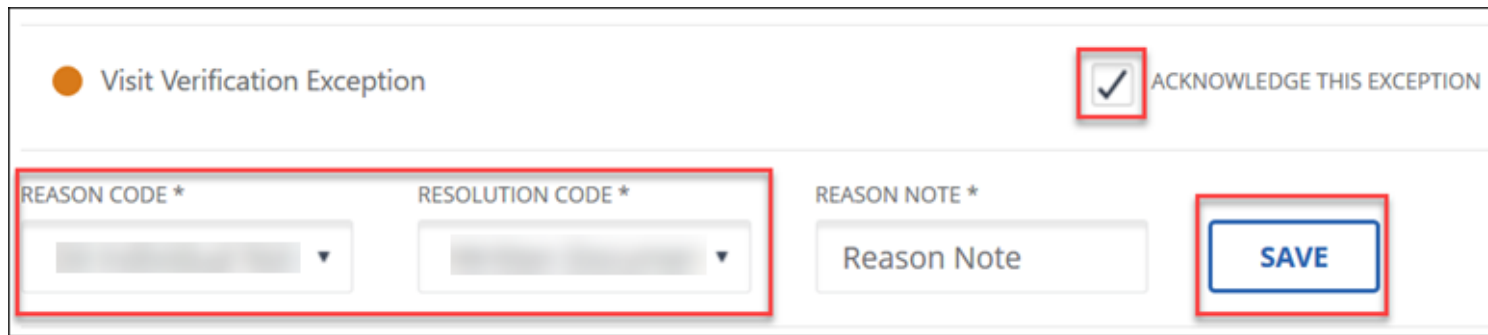
- ◆ This exception identifies when the start and end time has not been verified by the client at the end of the visit, either by confirming during MVV call-out or the client verifies time during the Telephony call-out.
- ◆ This exception type must be acknowledged for the visit to be in a verified state and eligible to be matched to a submitted claim.

1. Click the exception indicator under the **Client Name** Column.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out
Carter, John	Young, Charles	●	08/14/2017	●	2:47 PM			

CORRECTING EXCEPTIONS: VISIT VERIFICATION EXCEPTION

2. Check the **ACKNOWLEDGE THIS EXCEPTION** checkbox on the Visit Verification Exception line.
3. Select a **REASON CODE** from the list.
4. Select a **RESOLUTION CODE** from the list.
5. Click **SAVE**.

A screenshot of a web form titled 'Visit Verification Exception'. The form has a header bar with an orange circle icon and the title. Below the header, there is a checkbox labeled 'ACKNOWLEDGE THIS EXCEPTION' which is checked. Below this, there are three main sections: 'REASON CODE *' with a dropdown menu, 'RESOLUTION CODE *' with a dropdown menu, and 'REASON NOTE *' with a text input field. A 'SAVE' button is located to the right of the 'REASON NOTE' field. Red boxes highlight the 'ACKNOWLEDGE THIS EXCEPTION' checkbox, the 'REASON CODE' and 'RESOLUTION CODE' dropdowns, and the 'SAVE' button.

CORRECTING EXCEPTIONS: VISIT W/O IN-CALL/OUT-CALL

- ◆ This exception identifies a visit which does not have a call-in or call-out time. This exception type must be fixed for the visit to be in a verified state and eligible to be matched to a submitted claim.

Client Name	Employee Name	Service	Visit Date	Call In
Carter, John	Young, Charles	G015	08/14/2017	●

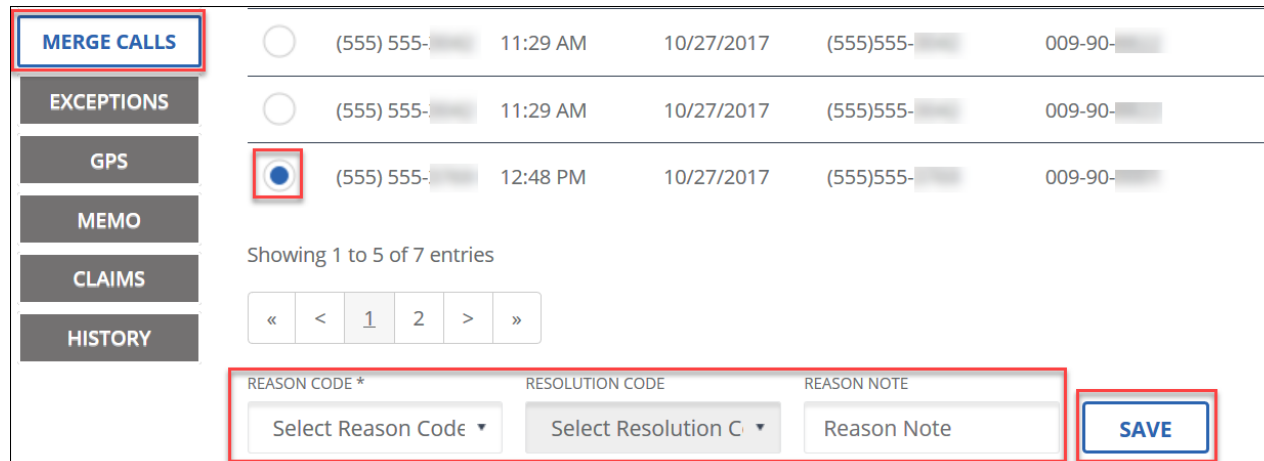
Client Name	Employee Name	Service	Visit Date	Call In	Call Out
		●	08/11/2017	8:58 AM	●



When a user clicks the exception indicator under the call time column, the *Visit Details* screen automatically opens to the *Call Log* screen. It is recommended to go to the *Merge Calls* screen first to see if there are any available calls that can be merged. If there are none, the user can go back to the *Call Log* to manually add a call time.

CORRECTING EXCEPTIONS: MERGE CALLS

1. Click the **MERGE CALLS** link to see if there are any calls that can be merged to the visit.
2. Click the radio button next to the line to select the call, if there is a call to merge.
3. Select the **REASON CODE**, **RESOLUTION CODE**, and **REASON NOTE**, if needed.
4. Click **SAVE**.



	Phone Number	Time	Date	Phone Number	Phone Number
<input type="radio"/>	(555) 555-XXXX	11:29 AM	10/27/2017	(555)555-XXXX	009-90-XXXX
<input type="radio"/>	(555) 555-XXXX	11:29 AM	10/27/2017	(555)555-XXXX	009-90-XXXX
<input checked="" type="radio"/>	(555) 555-XXXX	12:48 PM	10/27/2017	(555)555-XXXX	009-90-XXXX

Showing 1 to 5 of 7 entries

« < 1 2 > »

REASON CODE *	RESOLUTION CODE	REASON NOTE
Select Reason Code ▼	Select Resolution Code ▼	Reason Note

SAVE

CORRECTING EXCEPTIONS: ADD MANUAL CALL

1. Click **CALL LOG** (to enter a missing call)
2. Enter the appropriate information into the fields.
3. Select the **REASON CODE**, **RESOLUTION CODE**, **SERVICE**, and **REASON NOTE**, if needed.
4. Click **ADD**

GENERAL
CLIENT
EMPLOYEE
CALL LOG
MERGE CALLS
EXCEPTIONS
GPS
MEMO
CLAIMS
HISTORY

CALL IN

CLIENT ID# 000099955

CALL DATE	CALL TIME	CALL TYPE	SERVICE
10/27/2017	05:32 PM	FVV Call	N/A
USER	CALL SOURCE		
	SANDATA		

Add Manual Call

CALL DATE * MM/DD/YYYY

MM/DD/YYYY

CALL TIME * HH:MM AM/PM

11:21 AM

SERVICE

Select Service

REASON CODE *

Select Reason Co

RESOLUTION CODE

Select Resolution

REASON NOTE

Reason Note

ADD



CREATE CALL

CREATE CALL



- ◆ The Create Call feature allows the user to create a call in Sandata EVV for instances when a visit occurred but the employee did not call-in or call-out.

1. Click **CREATE CALL** on the *Visit Maintenance* screen.

Visit Maintenance Visit Maintenance / **Manage Visits**

Select a Visit **CREATE CALL**

DATE RANGE MM/DD/YYYY

02/21/2019  to 02/21/2019 

CLIENT

Enter Client

2. Search for and select the client.

Select Client

CLIENT FIRST NAME	CLIENT LAST NAME	CLIENT MEDICAID ID	CATEGORY
<input type="text"/>	<input type="text"/>	<input type="text" value="Enter Client Medicaid ID"/>	<input type="text" value="Select Category"/>
SUPERVISOR	PAYER	<input type="checkbox"/> LAST ACTIVE DATE	
<input type="text" value="All"/>	<input type="text" value="Select Payer"/>		

Client ID	Client Name	Client Medicaid ID	Supervisor	Select
<input type="text"/>	<input type="text" value="Adams, Peter"/>	<input type="text" value="1127862100111"/>		<input type="radio"/>

CREATE CALL

3. Click **NEXT**.
4. Search for and select an employee.

PREVIOUS **NEXT** CANCEL



Select Employee

EMPLOYEE FIRST NAME EMPLOYEE LAST NAME ☐ LAST ACTIVE DATE

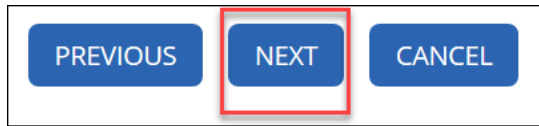
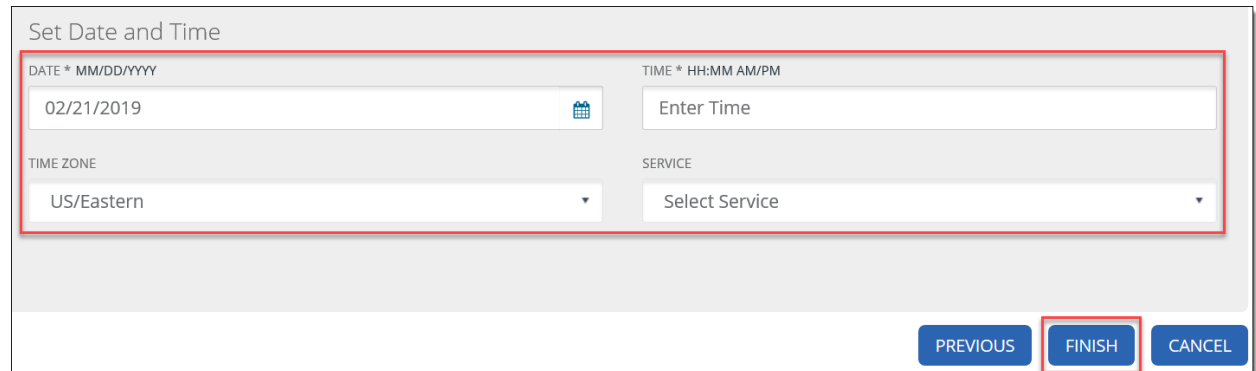
Q SEARCH CLEAR

Employee ID	Employee Name	Select
		<input checked="" type="radio"/>

« < 1 > »

CREATE CALL

5. Click **NEXT**.
6. Enter the **Date** and **Time** details.
7. Click **FINISH**.

A horizontal row of three blue buttons with white text. The 'NEXT' button is highlighted with a red rectangular border. A large red arrow points from the 'NEXT' button down to the 'Set Date and Time' form.A form titled 'Set Date and Time' with a red border. It contains four input fields: 'DATE * MM/DD/YYYY' with the value '02/21/2019' and a calendar icon; 'TIME * HH:MM AM/PM' with the placeholder 'Enter Time'; 'TIME ZONE' with a dropdown menu showing 'US/Eastern'; and 'SERVICE' with a dropdown menu showing 'Select Service'. At the bottom right, there are three blue buttons: 'PREVIOUS', 'FINISH' (highlighted with a red border), and 'CANCEL'.

QUESTIONS...

